

INSTRUCTIONS FOR COMPLETING TITLE IB PLANS

Title IB Budget Plan Summary (Adult or Dislocated Worker)

Program Type: Use the appropriate pre-marked page. Use one page for Adult and one page for Dislocated Worker. Check the appropriate line.

Funding Identification:

- Line 2. Enter the allocation for the corresponding program type for the year of appropriation (YOA). Include both the July 1 and the October 1 Workforce Investment Act (WIA) allocations.
- Line 3. Enter any adjustments to the allocation, plus or minus. Plus adjustments include voluntary obligations and reallocations. Minus adjustments include voluntary deobligations and recaptures.
- Line 4. Enter any transfers, in or out. Transfers are allowable only between the Adult and Dislocated Worker programs. No more than 20 percent of the total Adult and the total Dislocated Worker allocations may be transferred. The total allocation includes any voluntary obligations or reallocations received and excludes any voluntary deobligations or recaptures. During the coming year transfer will not be limited based on the amount reported here.
- Line 5 Total Lines 2, 3 and 4. This must equal Line 8.

Total Allocation Cost Category Plan:

- Line 6. Enter the total amount of the funds in Line 5 that will be spent on Program Services. This must be at least 90 percent of Line 5. Provide a break out of this amount by the program services listed in Lines 6.A. through 6.E. Line 6.E. (Other) includes activities that do not meet the definitions of the services listed in Lines 6.A through 6.D. and do not meet the definition of Administration as stated in the Department of Labor (DOL) Training and Employment Guidance Letter (TEGL) 1-00.
- Line 7. Enter the amount of the funds in Line 5 that will be spent on Administration through the WIA administrative cost pool. This can be no more than 10 percent of the Line 5. Adult funds do not need to be spent on only the Adult program and Dislocated Worker funds do not need to be spent only on the Dislocated Worker program. The Administration funds may be pooled and spent on WIA administrative needs as a whole.
- Line 8. Total Lines 6 and 7. This must equal Line 5.

Quarterly Total Expenditure Plan:

Lines 9-16. Enter the planned quarterly expenditures, on a cumulative basis, for each quarter, starting with July 1, 2000 expenditures. The dates shown in Lines 9 through 16 are the ending month of each quarter. The total of Lines 9 through 16 must equal Line 5 and Line 8.

Cost Compliance Plan:

Line 17. Divide planned Administration expenditures (Line 7) by TOTAL (Line 8). Enter the resulting percent. No more than 10 percent of the total funds available (Line 8) may be spent on Administration.

Title IB Budget Plan Summary (Youth)

Program Type: Use the appropriate pre-marked page. Check the appropriate line.

Funding Identification:

Line 2. Enter the allocation for the corresponding program type for the YOA. Include both the pre-July 1 (April 1 through June 30) WIA allocation, if appropriate, and the July 1 WIA allocation.

Line 3. Enter any adjustments to the allocation, plus or minus. Plus adjustments include voluntary obligations and reallocations. Minus adjustments include voluntary deobligations and recaptures.

Line 4 Total Lines 2 and 3. This must equal Line 7.

Total Allocation Cost Category Plan:

Line 5. Enter the total amount of the funds in Line 4 that will be spent on Program Services. This must be at least 90 percent of Line 4. Provide a break out of this amount by In School, Out-of-School, and Other, listed in Lines 5.A. through 5.C. At least 30 percent of Line 5 must be spent on Out-of-School youth (Line 5.B.). Line 5.C. (Other) includes activities that do not meet the definitions of the services listed in Lines 5.A and 5.B. and do not meet the definition of Administration as stated in the DOL TEGLE 1-00.

Line 6. Enter the amount of the funds in Line 4 that will be spent on Administration through the WIA administrative cost pool. This can be no more than 10 percent of the Line 4. Youth funds do not need to be spent on only the Youth program. The Administration funds may be pooled and spent on WIA administrative needs as a whole.

Line 7. Total Lines 5 and 6. This must equal Line 4.

Quarterly Total Expenditure Plan:

Lines 8-15. Enter the planned quarterly expenditures, on a cumulative basis, for each quarter, starting with July 1, 2000 **OR** starting with pre-July 1 (April 1 through June 30) WIA expenditures, if appropriate. The dates shown in Lines 8 through 15 are the ending month of each quarter. The total of Lines 8 through 15 must equal Line 4 and Line 7.

Cost Compliance Plan:

Line 16. Divide planned Administration expenditures (Line 6) by TOTAL (Line 7). Enter the resulting percent. No more than 10 percent of the total funds available (Line 7) may be spent on administration.

Title IB Adult Participation Plan Summary

The *Title IB Adult Participation Plan Summary* header shows that this is the initial plan for Program Year (PY) 2000. Below this information is room to identify future adjustments and modifications to the plan. Fill in the name of your local workforce investment area and the date that this supplement to the plan is submitted to the state.

Quarter Ending:

Line 1. Enter the first quarter's planned participants and provide cumulative information in succeeding quarters. This entry is the sum of Lines 2 and 3.

Line 2. Enter the number of participants carried in from the Job Training Partnership Act funded adult program. This number will be constant for all the quarters.

Line 3. Enter the cumulative number of new participants planned by quarter in the Title IB adult program.

Program Services:

Line 4. Record the total cumulative number of registered participants planned to receive staff assisted core services, i.e., services other than self-service and informational services.

Line 5. Record the total cumulative number of registered participants planned to receive intensive services. This number may be less than, equal to, or greater than the total number of participants since each participant may receive one or more services in the course of participation.

Line 6. Record the total cumulative number of registered participants planned to receive training services. This number may be less than, equal to, or greater than the total number of participants since each participant may receive one or more services in the course of participation.

Exit Status:

Line 7. Enter the total cumulative number of participants planned to exit the program beginning with the total number to exit the program in the first quarter. This entry is the sum of Lines 8 and 11. This entry must be less than or equal to Line 1.

Line 8. Enter the number of exiters that are planned to enter employment.

Line 9. Enter the planned number of exiters from Line 7 that entered training related employment.

Line 10. Enter the planned number of exiters from Line 7 that entered both employment and a training program to obtain a high school diploma/General Equivalency Diploma (GED), post secondary degrees/certificates, or credentials. (See DOL TEGL 1-99, *Core and Customer Satisfaction Performance Measures for the Workforce Investment System*.)

Line 11. Enter the planned number of exiters from Line 7 that exit for other reasons than having entered employment.

Title IB Dislocated Worker Participant Plan Summary

The *Title IB Dislocated Worker Participation Plan Summary* header shows that this is the initial plan for PY 2000. Below this information is room to identify future adjustments and modifications to the plan. Fill in the name of your local workforce investment area and the date that this supplement to the plan is submitted to the state.

Quarter Ending:

Line 1. Enter the first quarter's planned participants and provide cumulative information in succeeding quarters. This entry is the sum of Lines 2 and 3.

Line 2. Enter the number of participants carried in from the Job Training Partnership Act funded dislocated worker program. This number will be constant for all the quarters.

Line 3. Enter the cumulative number new participants planned for each quarter in the Title IB dislocated worker program.

Program Services:

Line 4. Record the total cumulative number of registered dislocated workers planned to receive staff assisted core services.

Line 5. Record the total cumulative number of registered dislocated workers planned to receive intensive services. This number may be less than, equal to or greater than the total number of participants since each participant may receive one or more services in the course of participation.

Line 6. Record the total cumulative number of dislocated workers planned to receive training services. This number may be less than, equal to or greater than the total number of participants since each participant may receive one or more services in the course of participation.

Exit Status:

Line 7. Enter the total cumulative number of participants planned to exit the program beginning with the total number to exit the program in the first quarter. This entry is the sum of Lines 8, 11 and 12. This entry must be less than or equal to Line 1.

Line 8. Enter the number of exiters that are planned to enter employment. This entry must be less than or equal to Line 7. It may be equal to or greater than the sum of Lines 9 and 10.

Line 9. Enter the number of exiters from Line 8 that entered training related employment.

Line 10. Enter the number of exiters from Line 8 that entered both employment and a training program to obtain a high school diploma/GED, post secondary degrees/certificates, or credentials. (See DOL TEGL 1-99, *Core and Customer Satisfaction Performance Measures for the Workforce Investment System*.)

Line 11. Enter the estimated number of exiters that may remain with the layoff employer. Base this information on an analysis of your local area's past experience.

- Line 12. Enter the planned number of exiters from Line 7 that exit for other reasons than having entered employment or remained with the layoff employer.

Title IB Older Youth Participant Plan Summary

The *Title IB Older Youth Participation Plan Summary* header shows that this is the initial plan for PY 2000. Below this information is room to identify future adjustments and modifications to the plan. Fill in the name of your local workforce investment area and the date that this supplement to the plan is submitted to the state.

Quarter Ending:

- Line 1. Enter the first quarter's planned participants and provide cumulative information in succeeding quarters. This entry is the sum of Lines 3 and 4.
- Line 2. Enter the number of participants in Line 1 that are out-of-school youth. There is no requirement regarding the number of out-of-school youth. The expenditures for out-of-school youth must equal 30 percent of the total youth expenditures.
- Line 3. Enter the number of older youth carried in from the Job Training Partnership Act funded youth program. This number will be constant for all the quarters.
- Line 4. Enter the cumulative number new participants planned for each quarter in the Title IB older youth program.

Exit Status

- Line 5. Enter the total cumulative number of participants planned to exit the program beginning with the total number to exit the program in the first quarter. This entry is the sum of Lines 6, 9, 10 and 11. This entry is less than or equal to Line 1.
- Line 6. Enter the number of exiters that are planned to enter employment.
- Line 7. Enter the number of exiters from Line 6 that entered training related employment.
- Line 8. Enter the number of exiters from Line 6 that entered both employment and a training program to obtain a high school diploma/GED, post secondary degrees/certificates, or credentials.
- Line 9. Enter the number of exiters from Line 5 that entered postsecondary education.

- Line 10. Enter the number of exiters from Line 5 that entered advanced training.
- Line 11. Enter the estimated number of exiters from Line 5 that exit for other reasons than having entered employment, entered postsecondary education or entered advanced training.

Title IB Younger Youth Participant Plan Summary

The *Title IB Younger Youth Participation Plan Summary* header shows that this is the initial plan for PY 2000. Below this information is room to identify future adjustments and modifications to the plan. Fill in the name of your local workforce investment area and the date that this supplement to the plan is submitted to the state.

Quarter Ending:

- Line 1. Enter the first quarter's planned participants and provide cumulative information in succeeding quarters. This entry is the sum of Lines 3 and 4.
- Line 2. Enter the number of participants in Line 1 that are out-of-school youth. This entry must be less than or equal to Line 1. This number is based on the estimated cost of serving out-of-school youth. It will not necessarily equal 30 percent of Line 1.
- Line 3. Enter the number of younger youth carried in from the Job Training Partnership Act funded youth program. This number will be constant for all the quarters.
- Line 4. Enter the cumulative number of new participants planned by quarter in the Title IB younger youth program.

Skills Attainment:

- Line 5. Enter the planned cumulative number of youth that will attain a skill in each quarter.

Exit Status:

- Line 6. Enter the total cumulative number of participants planned to exit the program beginning with the total number to exit the program in the first quarter. This entry is the sum of Lines 7, 9, 10, 11, 12, 13, 14, and 15, unless more than one outcome (Lines 9 through 14) is planned for some individuals. This entry is less than or equal to Line 1.

- Line 7. Enter the number of exiters that are planned to enter employment. This entry must be less than or equal to Line 6.
- Line 8. Enter the planned number of exiters from Line 7 to enter training related employment. This entry must be less than or equal to Line 7.
- Line 9. Enter the planned number of exiters from Line 6 to enter military service.
- Line 10. Enter the planned number of exiters from Line 6 to enter advanced training.
- Line 11. Enter the planned number of exiters from Line 6 to enter postsecondary education.
- Line 12. Enter the planned number of exiters from Line 6 to enter an apprenticeship program.
- Line 13. Enter the planned number of exiters from Line 6 to attain a high school diploma/GED.
- Line 14. Enter the planned number of exiters from Line 6 that were to return to secondary school. The youth exited WIA services but was still attending secondary school at exit.
- Line 15. Enter the estimated number of exiters from Line 6 to exit for other reasons than those recorded on Lines 7 through 14.